

## Annual Requirements for the USDA Special Milk Program

To ensure program compliance please distribute a copy of this calendar to each staff person responsible for completing the following tasks related to the operation of the Special Milk Program (SMP). All required program related materials must be retained by the School Food Authority (SFA) for 3 years plus the current year of operation for audit compliance. **Please note, this calendar is for schools only operating the SMP.** This is not for schools that also operate the National School Lunch Program.

Requirement	Due Date	Initials	Date Completed
<b>USDA Special Milk Program Online Contract</b> Update/renew the USDA SMP contract with DPI via Online Services Log In ( <a href="http://fns.dpi.wi.gov/fns_online">http://fns.dpi.wi.gov/fns_online</a> ). The contract must be updated for each school year. The “end date” for programs submitted on the contract must include summer school dates, if any. Actual approval of contracts will not begin until after the DPI system roll-over in July. The contract manual can be accessed at <a href="http://fns.dpi.wi.gov/sites/default/files/imce/fns/doc/smp_contract_manual.docx">http://fns.dpi.wi.gov/sites/default/files/imce/fns/doc/smp_contract_manual.docx</a> .	By June 26		
<b>Purchasing</b> Meet federal procurement (purchasing) requirements by documenting efforts to maximize open and free competition. SFAs must document informal procurement attempts to obtain a minimum of three price quotations if annual purchases for SMP are under the small purchase threshold (less than \$150,000). An informal procurement log can be found at <a href="http://fns.dpi.wi.gov/sites/default/files/imce/fns/doc/smp_log.doc">http://fns.dpi.wi.gov/sites/default/files/imce/fns/doc/smp_log.doc</a> . Formal procedures (Invitation for Bids or Requests For Proposal) may be use for any product and/or service that exceeds that threshold. Examples of solicitation documents for milk bids can be found on our website at <a href="http://fns.dpi.wi.gov/fns_prmb">http://fns.dpi.wi.gov/fns_prmb</a> .  Fluid milk must be fat-free milk, low-fat (1%) milk, fat-free or low-fat lactose reduced milk, fat-free or low-fat lactose-free milk, fat-free or low-fat buttermilk, or fat-free or low-fat acidified milk. Milk may be flavored or unflavored, and there is no variety requirement.	Prior to start of school year		
<b>Milk Pricing for Student (<i>Applicable to both Pricing Plan options</i>)</b> Reimbursement should be maximized to reduce the cost of milk for students. It is recommended to charge a student the difference between the anticipated per half-pint milk cost and the reimbursement rate. Consider adding on 2 cents to cover any milk price adjustments and administrative costs associated with the SMP program.  Example: $\frac{1}{2}$ pint cost \$____ + 2¢ – reimbursement \$____ = \$____ $\frac{1}{2}$ pint price X 180 days = \$____ annual charge	Prior to start of school year		

## Annual Requirements for the USDA Special Milk Program (Continued)

Requirement	Due Date	Initials	Date Completed
<b>Direct Certification (DC) (Pricing Plan - free milk option only)</b> If operating the SMP program with a free milk option, run DC to qualify students for free milk benefits. For those students qualifying, send the DC notification letter, found in the Free Milk application packet ( <a href="http://fns.dpi.wi.gov/fns_specmlk1">http://fns.dpi.wi.gov/fns_specmlk1</a> ), to the household promptly. It is not a requirement to run DC, but it is beneficial to help the SFA identify students for free milk benefits. The matching database is updated weekly. Maintain all original DC match lists at the SFA. DC resources can be accessed at <a href="http://fns.dpi.wi.gov/fns_directcert">http://fns.dpi.wi.gov/fns_directcert</a> .	Recommended to run DC prior to the start of the school year (preferably before application distribution) and as needed throughout the school year to qualify additional students for free milk benefits.		
<b>Free and Reduced Price Meal Application (Pricing Plan - free milk option only)</b> Print current applications for free milk from DPI's website. Distribute at the beginning of the school year after July 1 to ALL households (excluding students found on Direct Certification prior to distribution). The Free Milk application packet includes an updated prototype application, parent notification letter, notice of direct certification letter, and other related forms and can be found at <a href="http://fns.dpi.wi.gov/fns_specmlk1">http://fns.dpi.wi.gov/fns_specmlk1</a> . Process completed applications within 10 operating days after the date of receipt. Send notification to households with students who are eligible for free milk and to households that are denied benefits. File all approved and denied applications at the SFA, along with any other documentation supporting free milk eligibility.	After July 1		
<b>Benefit Issuance List (Pricing Plan - free milk option only)</b> From benefit documentation, create/maintain a benefit issuance list noting the student's name, benefit status, date of qualification, benefit type/source (i.e., DC or application). Benefit documentation includes Free Milk applications, documentation designating students as homeless by the public school district's homeless liaison, documentation designating students as migrant by migrant coordinator, documentation for foster or runaway students, and, if applicable, DC lists. Remember, carryover benefits from the prior school year are in effect for the first 30 operating days of school or until new benefit documentation is received. Information on carryover benefits can be found in the Eligibility Manual for School Meals <a href="http://fns.dpi.wi.gov/sites/default/files/imce/fns/pdf/eliman_0814.pdf">http://fns.dpi.wi.gov/sites/default/files/imce/fns/pdf/eliman_0814.pdf</a> . An example benefit issuance list can be found at <a href="http://fns.dpi.wi.gov/files/fns/pdf/beniss_ex.pdf">http://fns.dpi.wi.gov/files/fns/pdf/beniss_ex.pdf</a> .	Prior to start of school year  <i>Updates should be made throughout the year as new benefit documentation is received or as new students arrive</i>		
<b>Public Release (Pricing Plan - free milk option only)</b> Send the public release for free milk to local media and grassroots organizations that reach minority or under-represented groups. SFAs are required to send the public release and maintain documentation of where it was sent to but are not required to pay to have it published. A template Special Milk Program public release is available on the DPI website at <a href="http://fns.dpi.wi.gov/fns_specmlk1">http://fns.dpi.wi.gov/fns_specmlk1</a> .	Prior to start of school year		
<b>Food Safety</b> Develop and implement procedures for ensuring milk served by the SFA is wholesome by adhering to proper food safety practices. This includes maintaining temperature and cleaning logs for refrigeration units. Template logs can be found at <a href="http://fns.dpi.wi.gov/fns_specmlk1">http://fns.dpi.wi.gov/fns_specmlk1</a> .	Prior to start of school year		

## Annual Requirements for the USDA Special Milk Program (Continued)

Requirement	Due Date	Initials	Date Completed
<b>Local Wellness Policy (LWP)</b> All SFAs must establish and implement a LWP. Assessment and evaluation of this policy is also required. More information on the LWP can be found at <a href="http://fns.dpi.wi.gov/fns_wellnessplcy">http://fns.dpi.wi.gov/fns_wellnessplcy</a> .	Recommended to review annually and assess, at a minimum, tri-annually		
<b>Civil Rights Training</b> Complete the annual Civil Rights Training for staff involved with the SMP. The prototype training is updated yearly and available at <a href="http://fns.dpi.wi.gov/fns_market1#cr">http://fns.dpi.wi.gov/fns_market1#cr</a> , along with an attendance log. Maintain a copy of the training and attendance log at the SFA.	Prior to start of school year		
<b>And Justice for All Poster</b> Post <i>And Justice for All</i> posters in publically visible and readable areas where the program is administered. If new or additional posters are needed, please contact the SNT at 608-267-9228.	Prior to start of school year		
<b>Civil Rights Compliance Self-Evaluation</b> Complete the Civil Rights Compliance Self-Evaluation form and keep on file at the SFA. The Civil Rights Compliance Self-Evaluation Form can be accessed at <a href="http://dpi.wi.gov/files/forms/doc/f1441.doc">http://dpi.wi.gov/files/forms/doc/f1441.doc</a> .	By October 31		
<b>Financial Management</b> Maintain detailed and accurate financial records of program revenues and expenditures. Revenues obtained through the SMP are only to be used for SMP purposes. The cash balance should not exceed three months operating costs unless the SFA has a plan for the accumulated balance (i.e., saving for a replacement refrigeration unit).	Review internally at the end of the school year and as needed throughout the year		

## Daily and Monthly Requirements for the USDA Special Milk Program

Requirement	Due Date
<b>Point of Service (POS)</b> Obtain daily count of half-pints of milk (or half-pint equivalents) served to students at the point of service for each school listed on Schedule A of the online contract. SFAs with the <i>Pricing Plan - Free Milk Option</i> must obtain daily counts by individual students at the POS to document the number of half-pints served to students approved for free milk and the number of half-pints served to students who are in the paid category. The POS system (i.e., manual roster or electronic system) used for SFAs with this option must protect the identity of students who qualify for free milk. SFAs with the <i>Non-Pricing Plan</i> (no student is charged) and <i>Pricing Plan – No Free Milk Option</i> (all students pay a set charge, and there is no free milk) may obtain a daily count at the POS for all milk served to students. Schools using these two plans may count the number half-pints distributed to students in the classroom at the point of service and record this count on a calendar. <i>All SFAs participating in SMP must implement procedures to disallow milk served to adults and milk used in cooking when submitting the monthly reimbursement claim.</i>	Completed daily, review monthly
<b>Monthly Claims</b> Submit monthly claim for reimbursement to DPI via Online Services. Claims for reimbursement cannot be submitted <b>during</b> the claim month of operation. The only exception is the June claim, which can be submitted after the last meal service in June. Please refer to the claiming calendar below for submission deadlines. <b>Schools blocked from submitting claims using Online Services should submit the claim on paper before the monthly deadline (see chart below). Fax or e-mail claim copy to Jacqueline Jordee before the deadline at 608-267-9207 or <a href="mailto:jacqueline.jordee@dpi.wi.gov">jacqueline.jordee@dpi.wi.gov</a>.</b>	Monthly

### **60 Calendar Day Cut-off Deadlines for Submitting Claims for Reimbursement**

Claims for reimbursement for milk served under the Special Milk Program (SMP) must be submitted to DPI online for payment **within 60 calendar days after the end of the claiming period**. Only one claim per program is accepted per payment processing period. Processing occurs each Tuesday morning, unless that day is a holiday, in which case the processing would happen the following day. Payment processing does not occur the last 2 weeks of June and the last 2 weeks of December so that DPI's Business Office can do fiscal- and year-end closeouts.

Claiming Month	Last Day for Receipt/Postmark of Claim
January	April 1 (March 31 on leap years)
February	April 29
March	May 30
April	June 29
May	July 30
June	August 29
July	September 29
August	October 30
September	November 29
October	December 30
November	January 29

**Wisconsin Department of Public Instruction**  
**Special Milk Program website**  
[http://fns.dpi.wi.gov/fns\\_specmlk1](http://fns.dpi.wi.gov/fns_specmlk1)

**Online Services website**  
[http://fns.dpi.wi.gov/fns\\_online](http://fns.dpi.wi.gov/fns_online)

**School Nutrition Team Personnel Directory**  
[http://fns.dpi.wi.gov/fns\\_sntdirectory](http://fns.dpi.wi.gov/fns_sntdirectory)

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If you wish to file a Civil Rights program complaint of discrimination, complete the USDA Program Discrimination Complaint Form, found online at [http://www.ascr.usda.gov/complaint\\_filing\\_cust.html](http://www.ascr.usda.gov/complaint_filing_cust.html), or at any USDA office, or call (866) 632-9992 to request the form. You may also write a letter containing all of the information requested in the form. Send your completed complaint form or letter to us by mail at U.S. Department of Agriculture, Director, Office of Adjudication, 1400 Independence Avenue, S.W., Washington, D.C. 20250-9410, by fax (202) 690-7442 or email at [program.intake@usda.gov](mailto:program.intake@usda.gov).

Individuals who are deaf, hard of hearing, or have speech disabilities and wish to file either an EEO or program complaint please contact USDA through the Federal Relay Service at (800) 877-8339 or (800) 845-6136 (in Spanish).

Persons with disabilities who wish to file a program complaint, please see information above on how to contact us by mail directly or by email. If you require alternative means of communication for program information (e.g., Braille, large print, audiotope, etc.) please contact USDA's TARGET Center at (202) 720-2600 (voice and TDD).

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## At a Glance...USDA Special Milk Program Requirements

Annual Requirements	Due Date	Initials	Completed
USDA Child Nutrition Program Online Contract	By June 26		
Purchasing	Prior to start of school year		
Milk Pricing for Students (applicable to both <i>Pricing Plan</i> options)	Prior to start of school year		
Direct Certification	After July 1, preferably before the beginning of school year and as needed throughout the year		
Free and Reduced Price Meal Applications ( <i>Pricing Plan - free milk option only</i> )	After July 1		
Benefit Issuance List ( <i>Pricing Plan - free milk option only</i> )	Before the beginning of the school year <i>Updates should be made throughout the year as new benefit documentation is received</i>		
Public Release ( <i>Pricing Plan - free milk option only</i> )	Prior to start of school year		
Food Safety	Prior to start of school year		
Local Wellness Policy	Recommended to review annually and assess, at a minimum, tri-annually		
Civil Rights Training	Prior to start of school year		
<i>And Justice for All</i> Poster	Prior to start of school year		
Civil Rights Compliance Self-Evaluation	By October 31		
Financial Management	Review internally at the end of the school year and as needed throughout the year		

Daily and Monthly Requirement	Due Date
Point of Service (POS)	Completed daily, review monthly
Monthly Claims	Monthly

WI DPI Special Milk Program website

[http://fns.dpi.wi.gov/fns\\_specmlk1](http://fns.dpi.wi.gov/fns_specmlk1)

Online Services website

[http://fns.dpi.wi.gov/fns\\_online](http://fns.dpi.wi.gov/fns_online)

School Nutrition Team Personnel Directory

[http://fns.dpi.wi.gov/fns\\_sntdirectory](http://fns.dpi.wi.gov/fns_sntdirectory)